

RELEASE 5

MANUAL FOR LIBRARIANS

Comparing Counts between Release 4 and Release 5

Module 3

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COUNTER

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INTRODUCTION

This guide summarizes the key changes in reports between **Release 4** and **Release 5** of the **COUNTER** standard.

We shall look at examples of the new Release 5 Standard Views, and compare them to the corresponding Release 4 reports. This will highlight the new metric types so that you can see how they affect cost-per-use calculations, and how they offer new possibilities for usage analysis.

All our examples are based on real reports, but for clarity and convenience, we have adjusted them to highlight the key items of interest.

Also included are some considerations when making year-on-year comparisons of usage, especially bearing in mind the different patterns of usage that apply during the pandemic of 2020.

Finally, for convenience, we have included a summary of key points at the end of this manual.



SUMMARY OF CHANGES

MASTER REPORTS AND STANDARD VIEWS

In Release 5, there are four Master Reports. These provide the complete set of usage data for their subject.

- Title Master Report (book and journal usage)
- Database Master Report
- Platform Master Report
- Item Master Report (articles and multimedia content)

Standard Views are new for Release 5. These are pre-defined filters of the Master Reports. Each Standard View focuses on key types of analysis, to give you quick and convenient access to the information you need most.

- The Title Master Report has seven Standard Views. Three of them deal with book usage, and the other four deal with journal usage.
- The Database Master Report has two Standard Views: one for database usage and one for denials.
- The Platform Master Report has one Standard View.
- The Item Master Report again has two Standard Views, one for usage on articles and one for multimedia content.

INVESTIGATIONS AND REQUESTS

Before we look at the Standard Views, you need to know about two types of metric in Release 5.

- **Investigations** report a range of user actions related to a content item or title.
- **Requests** report where the user views or downloads full-content items.

So these two types of metric measure usage differently from each other. The Investigations count all activity, including downloads of content. The Requests count only views or downloads of content itself.

This diagram (*right*) shows eight different types of user interaction.

- All of these are counted as Investigations.
- However, three of them are also counted as Requests.

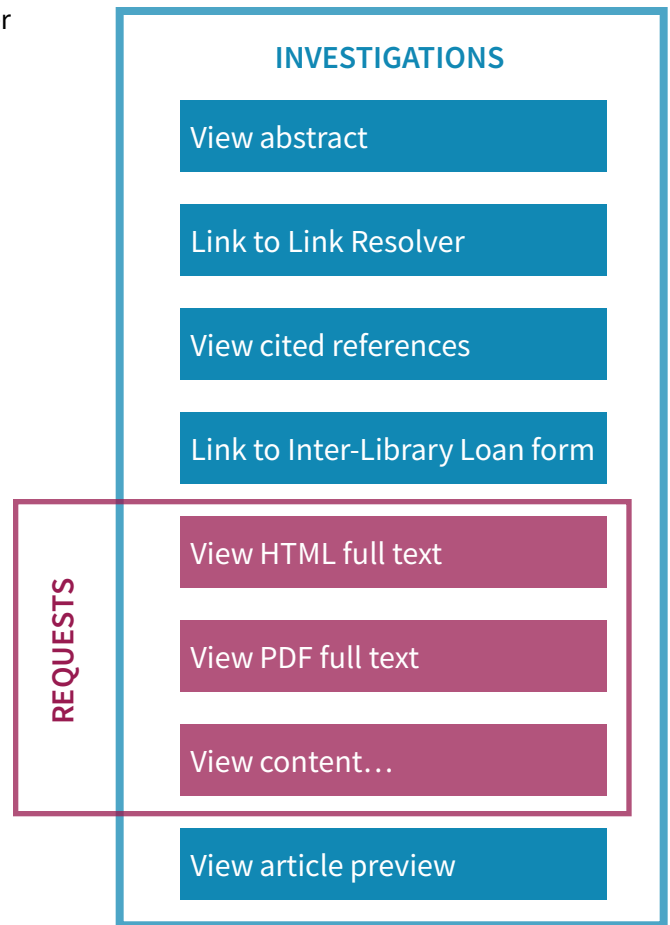
TOTAL AND UNIQUE METRICS

Investigations have several metrics:

- **Total_Item_Investigations** counts the total number of times a content item or information related to a content item was accessed during a session.
- **Unique_Item_Investigations** counts the number of unique content items investigated by a user in a session. If a user repeatedly performs an action with the same content during a session, this is counted only once.
- **Unique_Title_Investigations** is only used for books; it counts the number of unique times a book is investigated (as opposed to how often a chapter is investigated). If a user investigates several different chapters during a session, this is counted only once. Counting book usage independently from the delivery method is a new metric for Release 5.

The same three metrics are provided for Requests.

- **Total_Item_Requests** counts the total number of content items requested during a session.
- **Unique_Item_Requests** counts the number of unique content items requested (downloaded) in a user-session.
- **Unique_Title_Requests** is only used for books; it counts the number of unique times a book (as opposed to a chapter) is requested (downloaded) in a user session at title level.



Better metrics for counting book usage

A big advantage in Release 5 is that you can now count and compare book usage consistently.

In Release 4, you could (mostly) count book usage by chapter (section). You can still do this in Release 5 using the Item metrics:

- **Total_Item_Investigations**
- **Total_Item_Requests**
- **Unique_Item_Investigations**
- **Unique_Item_Requests**

Release 5 gives you two new metrics that count usage by book. Note that these are both Unique metrics, so they do not count repeated clicks on the same book in a session.

- **Unique_Title_Investigations** counts a range of activity on a book (clicks on abstracts, previews, and downloads, etc.).
- **Unique Title_Requests** counts only downloads of full text — which can be all or part of a book.

For example, imagine a book with 10 chapters, each in a separate file.

If the user downloads each chapter once in a session, the **Unique_Item_Requests** count is 10. However, the **Unique_Title_Requests** count is 1 — because this metric counts usage on title level, and all the downloads are of the same book.

It is true that book usage was reported in the Release 4 report BR1 — but this only covered books that were delivered exclusively as a single file. Now you can see book usage, regardless of whether the books are available as single files, as separate chapters, or both.

EXAMPLES

STANDARD VIEWS FOR THE TITLE MASTER REPORT

For journal usage, there are four Standard Views:

- TR_J1 Journal Requests (Excluding OA_Gold)
- TR_J2 Access Denials
- TR_J3 Journal Usage by Access Type (this lists Controlled and OA_Gold usage separately).
- TR_J4 Journal Requests by Year of Publication (Excluding OA_Gold).

For book usage, there are three Standard Views:

- TR_B1 Book Requests (Excluding OA_Gold)
- TR_B2 Access Denials
- TR_B3 Book Usage by Access Type

Journal Requests (Excluding OA_Gold) – TR_J1

This is designed for one of the most common use cases in libraries: cost-per-use analysis for paid Journal content.

Let us compare this Release 5 Standard View to the Release 4 Report JR1. We can see there are several major changes.

RELEASE 5

| Report_Name | Journal Requests (Excluding OA_Gold) | | | | | | | | | |
|--------------------------------|--------------------------------------|---------------|------------|-------------|----------------------|------------------------|----------|----------|----------|----------|
| Report_ID | TR_J1 | | | | | | | | | |
| Release | 5 | | | | | | | | | |
| Institution_Name | | | | | | | | | | |
| Title | Publisher | Platform | Print_ISSN | Online_ISSN | Metric_Type | Reporting_Period_Total | Aug-2018 | Sep-2018 | Oct-2018 | Nov-2018 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Total_Item_Requests | 1,214 | 257 | 209 | 517 | 231 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Unique_Item_Requests | 795 | 153 | 136 | 356 | 150 |
| Academic Radiology | Elsevier | ScienceDirect | 1076-6332 | 1878-4046 | Total_Item_Requests | 704 | 210 | 164 | 159 | 171 |
| Academic Radiology | Elsevier | ScienceDirect | 1076-6332 | 1878-4046 | Unique_Item_Requests | 452 | 129 | 110 | 106 | 107 |
| ACC Current Journal Review | Elsevier | ScienceDirect | 1062-1458 | | Total_Item_Requests | 3 | 1 | 0 | 0 | 2 |
| ACC Current Journal Review | Elsevier | ScienceDirect | 1062-1458 | | Unique_Item_Requests | 3 | 1 | 0 | 0 | 2 |
| Accident Analysis & Prevention | Elsevier | ScienceDirect | 0001-4575 | | Total_Item_Requests | 588 | 114 | 164 | 194 | 116 |
| Accident Analysis & Prevention | Elsevier | ScienceDirect | 0001-4575 | | Unique_Item_Requests | 405 | 74 | 102 | 154 | 75 |

RELEASE 4

| Journal Report 1 (R4) | Number of Successful Full-Text Article Requests by Month and Journal | | | | | | | | | | |
|--------------------------------|--|---------------------------------------|------------|-------------|------------------------|-----------------------|----------------------|----------------|----------------|----------------|----------------|
| Account: | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting period total | Reporting period HTML | Reporting period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 |
| Total for all journals | | ScienceDirect licensed content | | | 821,662 | 483,772 | 337,880 | 193,827 | 191,300 | 231,750 | 204,785 |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 1,220 | 763 | 457 | 257 | 209 | 523 | 231 |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 727 | 448 | 279 | 219 | 172 | 163 | 173 |
| ACC Current Journal Review | Elsevier | ScienceDirect licensed content | 1062-1458 | | 3 | 0 | 3 | 1 | 0 | 0 | 2 |
| Accident Analysis & Prevention | Elsevier | ScienceDirect licensed content | 0001-4575 | | 604 | 319 | 285 | 114 | 171 | 198 | 121 |
| Accident and Emergency Nursing | Elsevier | ScienceDirect licensed content | 0965-2302 | | 43 | 21 | 22 | 8 | 16 | 11 | 8 |
| Accounting Forum | Elsevier | ScienceDirect licensed content | 0155-9982 | 1467-6303 | 5 | 4 | 1 | 0 | 2 | 0 | 3 |

1. The new Standard View TR_J1 only shows Controlled usage.
2. The Standard View shows two metrics per journal:
Total_Item_Requests and **Unique_Item_Requests**.
3. There are no HTML and PDF metrics (as seen in the Release 4 report).
4. Journals with zero usage are not included in the Standard View.
5. There is no **Total for all journals** line. We now have two metrics for each journal, but they are measuring usage differently – you cannot add these together.

The key advantage is that you can immediately calculate cost per usage from TR_J1, because unpaid usage (OA_Gold) is not counted. To see usage of freely available content, you can use the Standard View TR_J3.

In Release 4, this is more difficult; you have to use two reports, the JR 1 and JR1GOA, and then subtract the totals from JR1GOA from the totals in JR1:

$$(TR_J1 \text{ Usage} = JR1 \text{ Usage} - JR1 \text{ GOA})$$

For a direct comparison, **Total_Item_Requests** in Release 5 corresponds to **Reporting period total** in Release 4. But note that Release 5 gives you lower counts because it does not count OA_Gold. In our example, *Academic Radiology* has a count of 704 for **Total_Item_Requests**. But if you subtract the unpaid usage (23) in JR1 GOA from the count in JR1 (727), then you have the same number, as you can see below.

| Report_Name | Journal Requests (Excluding OA_Gold) | | | | | | | | | |
|----------------------------|--------------------------------------|---------------|------------|-------------|----------------------|------------------------|----------|----------|----------|----------|
| Report_ID | TR_J1 | | | | | | | | | |
| Release | 5 | | | | | | | | | |
| Institution_Name | | | | | | | | | | |
| Title | Publisher | Platform | Print_ISSN | Online_ISSN | Metric_Type | Reporting_Period_Total | Aug-2018 | Sep-2018 | Oct-2018 | Nov-2018 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Total_Item_Requests | 1,214 | 257 | 209 | 517 | 231 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Unique_Item_Requests | 795 | 153 | 136 | 356 | 150 |
| Academic Radiology | Elsevier | ScienceDirect | 1076-6332 | 1878-4046 | Total_Item_Requests | 704 | 210 | 164 | 159 | 171 |
| Academic Radiology | Elsevier | ScienceDirect | 1076-6332 | 1878-4046 | Unique_Item_Requests | 452 | 129 | 110 | 106 | 107 |
| ACC Current Journal Review | Elsevier | ScienceDirect | 1062-1458 | | Total_Item_Requests | 3 | 1 | 0 | 0 | 2 |
| ACC Current Journal Review | Elsevier | ScienceDirect | 1062-1458 | | Unique_Item_Requests | 3 | 1 | 0 | 0 | 2 |

RELEASE 5: TR_J1

TR_J1 Usage =
JR1 Usage – JR1 GOA

| Journal Report 1 (R4) Number of Successful Full-Text Article Requests by Month and Journal | | | | | | | | | | | |
|--|-----------|--------------------------------|------------|-------------|------------------------|-----------------------|----------------------|---------|---------|---------|---------|
| Account: | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting period total | Reporting period HTML | Reporting period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 |
| Total for all journals | | ScienceDirect licensed content | | | 821,662 | 483,772 | 337,880 | 193,827 | 191,300 | 231,750 | 204,785 |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 1,220 | 763 | 457 | 257 | 209 | 523 | 231 |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 727 | 448 | 279 | 219 | 172 | 163 | 173 |
| ACC Current Journal Review | Elsevier | ScienceDirect licensed content | 1062-1458 | | 3 | 0 | 3 | 1 | 0 | 0 | 2 |

| Journal Report 1 GOA (R4) Number of Successful Gold Open Access Full-Text Article Requests by Month and Journal | | | | | | | | | | | |
|---|-----------|--------------------------------|------------|-------------|------------------------|-----------------------|----------------------|--------|--------|--------|--------|
| Account: | | | | | | | | | | | |
| Accounting Forum | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting Period Total | Reporting Period HTML | Reporting Period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 |
| Total for all journals | | ScienceDirect licensed content | | | 84,292 | 56,394 | 27,898 | 20,519 | 18,673 | 24,427 | 20,673 |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 6 | 4 | 2 | 0 | 0 | 6 | 0 |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 23 | 18 | 5 | 9 | 8 | 4 | 2 |

RELEASE 4: JR1

RELEASE 4: JR1 GOA

Now consider the importance of no longer counting HTML and PDF usage separately.

Unique_Item_Requests counts differently from anything in Release 4. First, it doesn't care what format the download is in. Second, it does not count repeated downloads of the same item in the same session. In many cases, a user views HTML full content and then downloads the PDF of the same article in the same session. **Unique_Item_Requests** only counts the first download; after that, it ignores further clicks on the same item in the same format or in the other format.

This makes **Unique_Item_Requests** a more accurate measure of downloaded content.

Looking further, let us compare Academic Radiology's count for **Unique_Item_Requests** (452). It is higher than the PDF count (279) and HTML count (448) in Release 4.

| Report_Name | Journal Requests (Excluding OA_Gold) | | | | | | | | | |
|----------------------------|--------------------------------------|---------------|------------|-------------|----------------------|------------------------|----------|----------|----------|----------|
| Report_ID | TR_J1 | | | | | | | | | |
| Release | 5 | | | | | | | | | |
| Institution_Name | | | | | | | | | | |
| Title | Publisher | Platform | Print_ISSN | Online_ISSN | Metric_Type | Reporting_Period_Total | Aug-2018 | Sep-2018 | Oct-2018 | Nov-2018 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Total_Item_Requests | 1,214 | 257 | 209 | 517 | 231 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Unique_Item_Requests | 795 | 153 | 136 | 356 | 150 |
| Academic Radiology | Elsevier | ScienceDirect | 1076-6332 | 1878-4046 | Total_Item_Requests | 704 | 210 | 164 | 159 | 171 |
| Academic Radiology | Elsevier | ScienceDirect | 1076-6332 | 1878-4046 | Unique_Item_Requests | 452 | 129 | 110 | 106 | 107 |
| ACC Current Journal Review | Elsevier | ScienceDirect | 1062-1458 | | Total_Item_Requests | 3 | 1 | 0 | 0 | 2 |
| ACC Current Journal Review | Elsevier | ScienceDirect | 1062-1458 | | Unique_Item_Requests | 3 | 1 | 0 | 0 | 2 |

RELEASE 5: TR_J1

Unique_Item_Requests
VS
PDF + HTML

| Journal Report 1 (R4) | | | | | | | | | | | Number of Successful Full-Text Article Requests by Month and Journal | | | |
|-------------------------------|-----------|---------------------------------------|------------|-------------|------------------------|-----------------------|----------------------|----------------|----------------|----------------|--|--|--|--|
| Account: | | | | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting period total | Reporting period HTML | Reporting period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 | | | |
| Total for all journals | | ScienceDirect licensed content | | | 821,662 | 483,772 | 337,880 | 193,827 | 191,300 | 231,750 | 204,785 | | | |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 | | | |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 1,220 | 763 | 457 | 257 | 209 | 523 | 231 | | | |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 727 | 448 | 279 | 219 | 172 | 163 | 173 | | | |
| ACC Current Journal Review | Elsevier | ScienceDirect licensed content | 1062-1458 | | 3 | 0 | 3 | 1 | 0 | 0 | 2 | | | |

RELEASE 4: JR1

| Journal Report 1 GOA (R4) | | | | | | | | | | | Number of Successful Gold Open Access Full-Text Article Requests by Month and Journal | | | |
|-------------------------------|-----------|---------------------------------------|------------|-------------|------------------------|-----------------------|----------------------|---------------|---------------|---------------|---|--|--|--|
| Account: | | | | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting Period Total | Reporting Period HTML | Reporting Period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 | | | |
| Total for all journals | | ScienceDirect licensed content | | | 84,292 | 56,394 | 27,898 | 20,519 | 18,673 | 24,427 | 20,673 | | | |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 | | | |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 6 | 4 | 2 | 0 | 0 | 6 | 0 | | | |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 23 | 18 | 5 | 9 | 8 | 4 | 2 | | | |

RELEASE 4: JR1 GOA

If you were previously using only the PDF count for usage analysis, you would almost certainly be missing out: 169 of the 448 HTML downloads have not led to PDF requests, but some of these probably represent usage where the user was happy to read the full text in HTML without the need for a pdf version — so should also be counted.

Now let us look at another example, comparing the **Release 5 Standard View** against the same two **Release 4 reports**.

| | | | | | | |
|--|--------------------------------------|-------------------|--------------------|----------------------|-------------------------------|-----------------|
| Report_Name | Journal Requests (Excluding OA_Gold) | | | | | |
| Report_ID | TR_J1 | | | | | |
| Release | 5 | | | | | |
| Institution_Name | | | | | | |
| | | | | | | |
| Title | Publisher | Print_ISSN | Online_ISSN | Metric_Type | Reporting_Period_Total | Jan-2019 |
| Photochemical and Photobiological Sciences | Royal Society of Chemistry | 1474-9147 | 1474-9092 | Unique_Item_Requests | 9 | 9 |
| Physical Chemistry Chemical Physics | Royal Society of Chemistry | 1463-9146 | 1463-9084 | Total_Item_Requests | 255 | 255 |
| Physical Chemistry Chemical Physics | Royal Society of Chemistry | 1463-9146 | 1463-9084 | Unique_Item_Requests | 215 | 215 |
| Polymer Chemistry | Royal Society of Chemistry | 1759-9951 | 1759-9962 | Total_Item_Requests | 13 | 13 |

RELEASE 5: TR_J1

Total_Item_Requests and Unique_Item_Requests are similar
HTML less than PDF

| | | | | | | | | | | | | |
|--|----------------------------|----------|--------------|------------------------|------------|-------------|------------------------|-----------------------|----------------------|--------|--|--|
| Period covered by Report: | | | | | | | | | | | | |
| 2019-01-01 to 2019-01-31 | | | | | | | | | | | | |
| Date run: | | | | | | | | | | | | |
| 07.02.2019 | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Journal | Publisher | Platform | Journal DOI | Proprietary Identifier | Print ISSN | Online ISSN | Reporting Period Total | Reporting Period HTML | Reporting Period PDF | Jan 19 | | |
| Total for all Journals | Royal Society of Chemistry | rsc.org | | | | | 2986 | 1233 | 1753 | 2986 | | |
| Photochemical & Photobiological Sciences | Royal Society of Chemistry | rsc.org | 10.1039/1/PP | | 1474-9051 | 1474-9092 | 14 | 6 | 8 | 14 | | |
| Physical Chemistry Chemical Physics | Royal Society of Chemistry | rsc.org | 10.1039/1/CP | | 1463-9071 | 1463-9084 | 324 | 147 | 177 | 324 | | |
| Polymer Chemistry | Royal Society of Chemistry | rsc.org | 10.1039/1/PY | | 1759-9951 | 1759-9962 | 13 | 4 | 9 | 13 | | |

RELEASE 4: JR1

| | | | | | | | | | | | | |
|--|----------------------------|----------|-----------------|------------------------|------------|-------------|------------------------|-----------------------|----------------------|--------|--|--|
| Period covered by Report: | | | | | | | | | | | | |
| 2019-01-01 to 2019-01-31 | | | | | | | | | | | | |
| Date run: | | | | | | | | | | | | |
| 07.02.2019 | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Journal | Publisher | Platform | Journal DOI | Proprietary Identifier | Print ISSN | Online ISSN | Reporting Period Total | Reporting Period HTML | Reporting Period PDF | Jan 19 | | |
| Total for all Journals | Royal Society of Chemistry | rsc.org | | | | | 767 | 456 | 311 | 767 | | |
| Photochemical & Photobiological Sciences | Royal Society of Chemistry | rsc.org | 10.1039/1474/PP | | 1474-9014 | 1474-9051 | 3 | 1 | 2 | 3 | | |
| Physical Chemistry Chemical Physics | Royal Society of Chemistry | rsc.org | 10.1039/1463/CP | | 1463-9014 | 1463-9084 | 69 | 47 | 22 | 69 | | |
| Polymer Chemistry | Royal Society of Chemistry | rsc.org | 10.1039/1759/PY | | 1759-9917 | 1759-9962 | 0 | 0 | 0 | 0 | | |

RELEASE 4: JR1 GOA

In our first example, we saw a journal where the HTML count was higher than the PDF count. In the new example, according to Release 4, *Physical Chemistry* has a lower HTML count (147-47=100) than its PDF count (177-22=155). The Release 5 Standard View shows a **Unique_Item_Requests** count of 215.

So what are we seeing?

Let's compare the two examples directly.

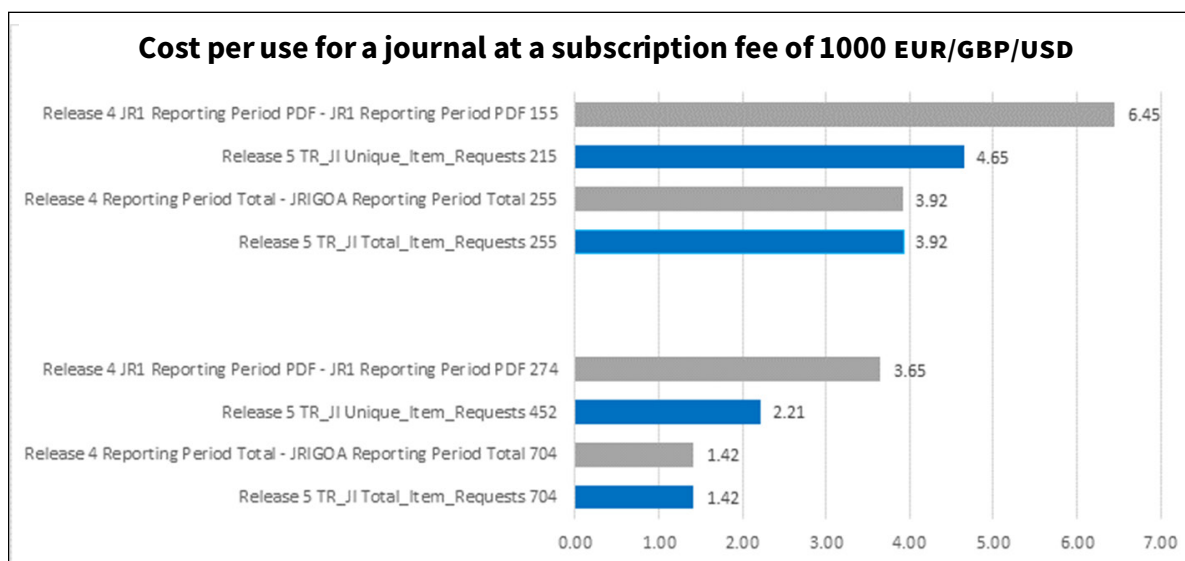
| | Release 4 | | Release 5 | | |
|-----------|---------------------------|--------------------------|---------------------|----------------------|------------------------|
| | HTML Usage (GOA excluded) | PDF Usage (GOA excluded) | Total Item Requests | Unique Item Requests | Ratio Unique vs. Total |
| Example 1 | 430 | 274 | 704 | 452 | 0,64 |
| Example 2 | 100 | 155 | 255 | 215 | 0,84 |

Different platforms have different delivery methods for content. Sometimes the landing page on a platform is the full text HTML and sometimes not. In the long run, comparing the **Total_Item_Requests** and **Unique_Item_Requests** will help you to see which is which. **Landing pages with full HTML** are more likely to give you lower ratios between **Total_Item_Requests** and **Unique_Item_Requests**.

Example 1 shows more HTML usage than PDF usage. So, more often than not, users who viewed the HTML full-text went on to download a PDF of the same article.

In Example 2, HTML usage is lower than PDF usage. We can also see that the counts for **Total_Item_Requests** and **Unique_Item_Requests** are much closer to each other. 84% of the downloads (215 from 255) were unique — there weren't many repeat downloads within a session. So, it looks like PDF usage was quite independent of HTML views for this journal.

Now what does all this mean for our cost per use calculations? We can put the two together for comparison.



The counts for **Total_Item_Requests** (Release 5) and **Reporting period totals** (Release 4) are the same, as we now know; so, for each journal, we get the same cost-per-use from Release 4 and Release 5. If you previously focused on **Reporting period totals** as your main measure of usage, then you can now use **Total_Item_Requests** and make direct comparisons.

However, if you compare **Unique_Item_Requests** to **Reporting Period PDF**, there is a pronounced difference. If you calculated from **Reporting Period PDF** before, you now have to expect a higher count in **Unique_Item_Requests**, and therefore, lower cost-per-usage numbers.

Journal Requests by Access Type: TR_J3

This Standard View shows Controlled usage and OA usage at your institution. This covers usage on the campus and any remote access to the campus network that can be attributed electronically to your institution. Remote access that cannot be attributed to your institution will not be included. You can find out more about the challenges of attributing usage to institutions in COUNTER Foundation Class 12: [Usage in the time of the pandemic](#).

The Standard View TR_J3 shows all Investigation and Request metrics. That means you can look specifically for OA_Gold usage and compare it to usage of Controlled content.

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| | | | | | | | | | | | |
|---------------------|------------------------------|-----------------|-------------------|--------------------|--------------------|----------------------------|------------------------------------|-----------------|-----------------|-----------------|-----------------|
| Report_Name | Journal Usage by Access Type | | | | | | | | | | |
| Report_ID | TR_J3 | | | | | | | | | | |
| Release | 5 | | | | | | | | | | |
| Institution_Name | | | | | | | | | | | |
| Title | Publisher | Platform | Print_ISSN | Online_ISSN | Access_Type | Metric_Type | Reporting_Period _Total | Aug-2018 | Sep-2018 | Oct-2018 | Nov-2018 |
| AASRI Procedia | Elsevier | ScienceDirect | 2212-6716 | | OA_Gold | Total_Item_Investigations | 8 | 4 | 3 | 0 | 1 |
| AASRI Procedia | Elsevier | ScienceDirect | 2212-6716 | | OA_Gold | Total_Item_Requests | 7 | 3 | 3 | 0 | 1 |
| AASRI Procedia | Elsevier | ScienceDirect | 2212-6716 | | OA_Gold | Unique_Item_Investigations | 6 | 2 | 3 | 0 | 1 |
| AASRI Procedia | Elsevier | ScienceDirect | 2212-6716 | | OA_Gold | Unique_Item_Requests | 6 | 2 | 3 | 0 | 1 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Controlled | Total_Item_Investigations | 1,206 | 252 | 207 | 518 | 229 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Controlled | Total_Item_Requests | 1,194 | 250 | 202 | 517 | 225 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Controlled | Unique_Item_Investigations | 795 | 152 | 135 | 358 | 150 |
| Academic Pediatrics | Elsevier | ScienceDirect | 1876-2859 | 1876-2867 | Controlled | Unique_Item_Requests | 790 | 151 | 133 | 356 | 150 |

RELEASE 4

| | | | | | | | | | | | | |
|--------------------------------|--|---------------------------------------|---|--------------------|-------------------------------|------------------------------|-----------------------------|----------------|----------------|----------------|----------------|--|
| Journal Report 1 (R4) | Number of Successful Full-Text Article Requests by Month and Journal | | | | | | | | | | | |
| Account: | | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting period total | Reporting period HTML | Reporting period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 | |
| Total for all journals | | ScienceDirect licensed content | | | 821,662 | 483,772 | 337,880 | 193,827 | 191,300 | 231,750 | 204,785 | |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 | |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 1,220 | 763 | 457 | 257 | 209 | 523 | 231 | |
| Academic Radiology | Elsevier | ScienceDirect li | Journal Report 1 GOA (R4) Number of Successful Gold Open Access Full-Text Article Requests by Month and Journal | | | | | | | | | |
| ACC Current Journal Review | Elsevier | ScienceDirect li | Account: | | | | | | | | | |
| Accident Analysis & Prevention | Elsevier | ScienceDirect li | | | | | | | | | | |
| Accident and Emergency Nursing | Elsevier | ScienceDirect li | | | | | | | | | | |
| Accounting Forum | Elsevier | ScienceDirect li | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Reporting Period Total | Reporting Period HTML | Reporting Period PDF | Aug-18 | Sep-18 | Oct-18 | Nov-18 | |
| Total for all journals | | ScienceDirect licensed content | | | 84,292 | 56,394 | 27,898 | 20,519 | 18,673 | 24,427 | 20,673 | |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 7 | 0 | 7 | 3 | 3 | 0 | 1 | |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 6 | 4 | 2 | 0 | 0 | 6 | 0 | |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 23 | 18 | 5 | 9 | 8 | 4 | 2 | |

In our example, there are two journals. The Release 5 Standard View shows four metrics for each. The **Access_Type** column shows whether the content was Controlled or OA_Gold, so you can see the relevant counts immediately. By contrast, in Release 4, there is only a single line for each journal, and you need to check the count in JR1 GOA to find OA_Gold usage.

Journal Requests by YOP (Excluding OA_Gold): TR_J4

This Standard View breaks down the usage of journal content (excluding OA_Gold content) by year of publication (YOP).

Here, we compare it to the Release 4 report JR5:

RELEASE 5

| Report_Name | Journal Requests by YOP (Excluding OA_Gold) | | | | | | | | | | |
|---------------------|---|------------------------|------------|-------------|------|----------------------|------------------|----------|----------|----------|----------|
| Report_ID | TR_J4 | | | | | | | | | | |
| Release | 5 | | | | | | | | | | |
| Title | Publisher | Platform | Print_ISSN | Online_ISSN | YOP | Metric_Type | Reporting_Period | | | | |
| | | | | | | | Total | Aug-2018 | Sep-2018 | Oct-2018 | Nov-2018 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2001 | Total_Item_Requests | 2 | 2 | 0 | 0 | 0 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2001 | Unique_Item_Requests | 1 | 2 | 0 | 0 | 0 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2009 | Total_Item_Requests | 37 | 6 | 2 | 12 | 17 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2009 | Unique_Item_Requests | 22 | 3 | 1 | 9 | 9 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2010 | Total_Item_Requests | 14 | 3 | 6 | 0 | 5 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2010 | Unique_Item_Requests | 11 | 3 | 3 | 0 | 5 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2011 | Total_Item_Requests | 17 | 2 | 8 | 5 | 2 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2011 | Unique_Item_Requests | 12 | 1 | 4 | 5 | 2 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2012 | Total_Item_Requests | 17 | 2 | 8 | 3 | 4 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed | 1876-2859 | 1876-2867 | 2012 | Unique_Item_Requests | 12 | 2 | 5 | 2 | 3 |

RELEASE 4

| Journal Report 5 (R4) | | | | | | | | | | | | |
|--|-----------|---------------------------------------|------------|-------------|------------------|--------------|----------------|---------------|---------------|---------------|---------------|---------------|
| Number of Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal | | | | | | | | | | | | |
| Account: | | | | | | | | | | | | |
| Journal | Publisher | Platform | Print ISSN | Online ISSN | Article in Press | YOP 2019 | YOP 2018 | YOP 2017 | YOP 2016 | YOP 2015 | YOP 2014 | YOP 2013 |
| Total for all journals | | ScienceDirect licensed content | | | 17,967 | 8,944 | 212,703 | 97,629 | 72,375 | 61,438 | 47,556 | 38,465 |
| AASRI Procedia | Elsevier | ScienceDirect licensed content | 2212-6716 | | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 |
| Academic Pediatrics | Elsevier | ScienceDirect licensed content | 1876-2859 | 1876-2867 | 81 | 0 | 258 | 211 | 365 | 77 | 63 | 75 |
| Academic Radiology | Elsevier | ScienceDirect licensed content | 1076-6332 | 1878-4046 | 105 | 11 | 184 | 111 | 53 | 35 | 19 | 31 |
| ACC Current Journal Review | Elsevier | ScienceDirect licensed content | 1062-1458 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Accident Analysis & Prevention | Elsevier | ScienceDirect licensed content | 0001-4575 | | 6 | 7 | 116 | 31 | 40 | 73 | 49 | 28 |

1. The Release 5 Standard View shows only Controlled usage.
2. For each journal, there are two metrics: **Total_Item_Requests** and **Unique_Item_Requests**.
3. In contrast to Release 4, there is no year grouping for older years. Each year has a separate line rather than being a column. (JR 5 in Release 4 has a crosstab or matrix format.)
4. Usage is shown per month in columns.

You can also use this Standard View for cost-per-usage analysis; choose the publication year as a filter so that you can analyse usage of current content or of backfile content.

You can also use Excel to make a pivot table to work out aggregated usage per journal and year of publication if you put the titles in rows and YOP in columns.

Standard Views for Books

There are three Standard Views for books, all of which show the Year of Publication (YOP) for each book:

- TR_B1 Book Requests (Excluding OA_Gold)
- TR_B2 Access Denials
- TR_B3 Book Usage by Access Type

Let us compare Standard View TR_B1 in Release 5 with BR2, which was the most commonly used report in Release 4.

RELEASE 5

| | | | | | | | | | | | | |
|-------------------------------|-----------------------------------|--------------|--------------|-------------------|------------|-------------|-----|----------------------------|------------------------|----------|--|--|
| Report_Name | Book Requests (Excluding OA_Gold) | | | | | | | | | | | |
| Report_ID | TR_B1 | | | | | | | | | | | |
| Release | 5 | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Title | Publisher | Publisher_ID | Platform | ISBN | Print_ISSN | Online_ISSN | YOP | Metric_Type | Reporting_Period_Total | Jan-2019 | | |
| Handbook of Vacuum Technology | Wiley | ISNI_0000C | Wiley Online | 978-0-527-68826-5 | | | | 2016 Unique_Title_Requests | 1 | 1 | | |
| Handbook of Vacuum Technology | Wiley | ISNI_0000C | Wiley Online | 978-0-527-68826-5 | | | | 2016 Total_Item_Requests | 23 | 23 | | |

RELEASE 4

| | | | | | | | | | | | | |
|--|--|----------------|----------|--------------------|------|------------------------|--------|--|--|--|--|--|
| Book Report 2 (R4) | Number of Successful Section Requests by Month and Title | | | | | | | | | | | |
| Forschungszentrum Juelich Gbmh Zentral | Section Type: | | | | | | | | | | | |
| | Chapter | | | | | | | | | | | |
| Period covered by Report: | | | | | | | | | | | | |
| 2019-01-01 to 2019-01-31 | | | | | | | | | | | | |
| Date run: | | | | | | | | | | | | |
| | 01.03.2019 | | | | | | | | | | | |
| | Publisher | Platform | Book DOI | Proprietary k:ISBN | ISSN | Reporting Period Total | Jan 19 | | | | | |
| Total for all titles | John Wiley at Wiley Online Library | | | | | 693 | 693 | | | | | |
| Handbook of Vacuum Technology | John Wiley at Wiley Online | 10.1002/978 BK | | 978-3-527-68826-5 | | 23 | 23 | | | | | |

There are three things to note immediately:

1. The Year of Publication is shown for each book.
2. There are two metrics shown for each book.
3. **Unique_Title_Requests** gives you a consistent metric for all book providers.

First, we shall look at the two metrics.

- **Unique_Title_Requests**
- **Total_Item_Requests**

To understand these, you need to consider two different ways of measuring book usage:

- by book
- by section or chapter

Unique_Title_Requests measures usage by book, and it is a Unique metric — it does not count repeated clicks by the same user in the same session. So, if a user downloads three different chapters of the same book in a session, this metric only counts the first download. The others are not counted because they are repeated clicks on the same book. If the book is provided as a single file, then the first click to download it is counted. If the user clicks to download it again in the same session, then that is not counted.

The useful thing about **Unique_Title_Requests** is that it enables you to compare usage of books across platforms, regardless of how they make books available.

Now look at the second metric in the Standard View. **Total_Item_Requests** measures usage at Item level — by section or chapter. This is a Total count — it counts every download of full content, including repeated downloads of the same chapter or the same book in the same session — even a download of the entire book in a single file. So this number will almost always be larger than the Unique number — and never lower.

Look again at the comparison between the Release 5 Standard View and the Release 4 report BR2. The number of **Total_Item_Requests** in our Standard View is the same as the count in the Release 4 report.

For platforms where book content is provided as chapters only, you can compare these two directly. But if a platform provides both chapter downloads and whole book downloads, you cannot do this (because whole book downloads are also counted as Item requests).

COMPARING BOOK USAGE (not chapter usage)

Let us consider how **Unique_Title_Requests** enables you to compare usage of books — as opposed to chapters — with the following example, where we compare the usage of two books on different platforms:

- *Umbrian Vernacular Architecture* has 12 individual chapters. It is available only as a single file. If 10 users download the book once each, the **Unique_Title_Requests** count is 10.
- *Early Tuscan Viticulture* also has 12 chapters, but the book is available for downloading as 12 different chapters.

If a user downloads all 12 chapters in a session, then the **Unique_Title_Requests** count is only 1 — all the downloads are for the same book.

If another user only downloads two chapters of the book, the **Unique_Title_Requests** count is again 1.

If another user downloads a chapter of the book and then downloads the whole book in a single file, then the **Unique_Title_Requests** count is still only 1. It is the same book, downloaded in the same session.

Altogether, if 12 different users download one or more chapters of the book, then the count is 12.

If you want to see the difference between the number of chapters downloaded and the number of books downloaded, use the Title Master Report in Release 5; and include the attributes **Data_Type** and **Section_Type**; this shows the counts for books (**Data_Type**) and chapters (**Section_Type**). At the moment, there is no Standard View that shows this.

Here are the key points to note:

- If a platform only makes books available as single files, then the **Unique_Title_Requests** count will always be the same as **Unique_Item_Requests** shown in TR_B3 or in the Title Master Report.
- If a platform only makes books available as sections (chapters), then you can measure book usage by **Unique_Title_Requests**. You can measure section (chapter) usage by **Total_Item_Requests** (shown in TR_B1) or by **Unique_Item_Requests** (shown in TR_B3 or in the Title Master Report).
- If a platform makes books available as sections (chapters) as well as single files of the complete book, then you can measure book usage by **Unique_Title_Requests**. To measure section (chapter) usage, use the **Title Master Report**, and include the attributes **Data_Type** and **Section_Type**; look at **Total_Item_Request** or **Unique_Item_Requests**, filtered by **Data_Type = Book** and **Section_Type = Chapter**.

At the moment, there is no Standard View in Release 5 that shows this. This will be amended in a future update of the Code of Practice.

- In addition to platforms that deliver chapters only or books only, some platforms have other approaches to user experience.
On some platforms, a user can request an entire book, and all the chapters in that book are delivered in a Zip File. These publishers report each of the chapters as **Unique_Item_Requests**.

On other platforms, if a user requests an entire book, all the chapters in that book are converted on the fly into a single PDF file. These publishers report each of the chapters as **Unique_Item_Requests**.

- For legacy reasons, a few platforms that deliver books as a single file counted full-text requests at the chapter/section level in Release 4. They calculated this by multiplying book usage counts by the number of chapters or sections of each used book. This is not possible in Release 5, so you cannot compare them.

Now let us look at the Standard View TR_B3 – Book Usage by Access Type. This is useful for two main reasons:

- You can now see OA_Gold usage for book content.
- It shows more metrics than the Standard View TR_B1.

So, let us compare Release 5 Standard View TR_B3 for the same period with the report BR2 from Release 4.

RELEASE 5

| | | | | | | | | |
|-------------------------------|---------------------------|-----------------|----------------|--------------------|----------------------------|------------------------------------|-----------------|--|
| Report_Name | Book Usage by Access Type | | | | | | | |
| Report_ID | TR_B3 | | | | | | | |
| Release | 5 | | | | | | | |
| | | | | 1 | 2 | | | |
| Title | Publisher | Platform | ISBN | Access_Type | Metric_Type | Reporting_Period _Total | Jan-2019 | |
| Handbook of Vacuum Technology | Wiley | Wiley Online | 978-3-527-6882 | Controlled | Total_Item_Investigations | 46 | 46 | |
| Handbook of Vacuum Technology | Wiley | Wiley Online | 978-0-527-6882 | Controlled | Total_Item_Requests | 23 | 23 | |
| Handbook of Vacuum Technology | Wiley | Wiley Online | 978-3-527-6882 | Controlled | Unique_Item_Investigation | 23 | 23 | |
| Handbook of Vacuum Technology | Wiley | Wiley Online | 978-0-527-6882 | Controlled | Unique_Item_Requests | 23 | 23 | |
| Handbook of Vacuum Technology | Wiley | Wiley Online | 978-3-527-6882 | Controlled | Unique_Title_Investigation | 1 | 1 | |
| Handbook of Vacuum Technology | Wiley | Wiley Online | 978-0-527-6882 | Controlled | Unique_Title_Requests | 1 | 1 | |

RELEASE 4

| | | | | | | | | |
|--|--|-----------------|-----------------|----------------------------|-------------|-------------------------------|---------------|--|
| Book Report 2 (R4) | Number of Successful Section Requests by Month and Title | | | | | | | |
| Forschungszentrum Juelich Gbmh Zentral | Section Type: | | | | | | | |
| | Chapter | | | | | | | |
| Period covered by Report: | 2019-01-01 to 2019-01-31 | | | | | | | |
| Date run: | 01.03.2019 | | | | | | | |
| | Publisher | Platform | Book DOI | Proprietary lc/ISBN | ISSN | Reporting Period Total | Jan 19 | |
| Total for all titles | John Wiley at Wiley Online Library | | | | | 693 | 693 | |
| Handbook of Vacuum Technology | John Wiley at Wiley Online | 10.1002/978 BK | | 978-3-527-68826-5 | | 23 | 23 | |

Note two things:

1. Controlled content and OA_Gold are listed separately in the Release 5 Standard View. Our example shows only Controlled content.
2. For each book on the platform, six metrics are shown on separate lines (but remember, titles that have had no usage at all during the reporting period are not displayed).

The best way of looking at the information on each book is to note that the first four metrics focus on usage by chapter. The last two count usage by book. Together, this gives a more detailed understanding of activity.

Let us look at each metric in turn and see how this builds up:

1. **Total_Item_Investigations** is 46. This shows that there have been 46 clicks on full content or related content of chapters over the period. It might be a lot of usage — or it might not.
2. **Total_Item_Requests** is 23. This tells us that only 23 of those 46 clicks downloaded full text of a chapter. This corresponds to the only number given in the Release 4 report, and in most cases, it should be similar or identical.

3. **Unique_Item_Investigations** is also 23. This tells us that 23 different chapters were investigated by the 46 clicks. At this stage, we don't know how many sessions that covers — so it is still possible that some of these are for the same chapter.
4. **Unique_Item_Requests** is also 23. This tells us that every one of the 23 downloads was unique — the user did not download the same chapter more than once in a session.
5. So far, we have been counting chapters (Items). Now we see the counts for books. **Unique_Title_Investigations** is 1. So we now know that all the activity must have been a single user in a single session.
6. **Unique_Title_Requests** is also 1. This confirms what we now know — one download of one book.

From this, we can be almost certain that this book has 23 chapters. It is most likely that the user clicked to view a summary of each chapter (23 **Total_Item_Investigations**) and then downloaded a PDF of each one (23 more **Total_Item_Investigations** to give a total of 46, and 23 **Total_Item_Requests**). So, it looked like there was a lot of usage at first glance, but, in practice, one book has been downloaded by one user, as seen in **Unique_Title_Requests**.

If we do a cost-per-usage table, we can see how clear the difference is.

| Cost per use for book with 100 EUR/GBP/USD Fee | | |
|--|----|--------|
| Release 5 TR_B1 Unique_Title_Requests | 1 | 100.00 |
| Release 5 TR_B1 Total_Item_Requests | 23 | 4.35 |
| Release 5 TR_B3 Unique_Item_Requests | 23 | 4.35 |
| Release 4 BR2 Reporting period total | 23 | 4.35 |

The top line shows the real cost-per-usage, based on the **Unique_Title_Requests** count of 1.

Total_Item_Requests, **Unique_Item_Requests**, and the Release 4 total all give a figure based on chapter (section) usage, which is not realistic.

So, let us say this one more time, **Unique_Title_Requests** is your best choice for calculating comparable cost-per-usage for books across different platforms.

STANDARD VIEWS FOR PLATFORM REPORTS AND DATABASE REPORTS

Our manuals on Database Reports and Platform Reports are due for publication early in 2021. These will include sections on comparing Release 5 and Release 4 reports.

COMPARISON IN THE TIME OF COVID

The measures to combat the spread of the Coronavirus outbreak of 2020 have affected the way systems are used — and this will certainly be reflected in the figures you see on your COUNTER reports. In some cases, you are likely to see lower numbers; this does not mean that your electronic resources have suddenly become less valuable!

To put this into context, one publisher has reported a 200% increase in activity — but it has only been able to attribute 20% of this. The effect of that from the librarian's point-of-view is that the reported usage figures will be down even when the actual usage has increased dramatically.

When you do your year-on-year comparisons, please bear this in mind. There are two main reasons why usage figures will be different:

- Many users have been working from home.
- Some publishers have opened their content for the duration of the outbreak.

HOME WORKING

Users working on campus can almost always be verified through the IP address, so their usage is attributed to the University and will appear in your reports. However, when users work from home, they are not within your institution's IP addresses, so this usage will not appear in your reports. Publishers have no way of validating or attributing the usage.

Unless another method is used for off-campus library access, home users can access open content, but they cannot access subscription content.

Additionally, some users might not understand how off-campus library access works — they will simply give up.

OPEN CONTENT

Publishers and vendors have made some or all their content open in order to support the scientists and medical professionals who are working on the virus. As a result, anyone can access that content, not just those within the IP range of a subscribing institution.

If your library enables off-campus access to subscription content, it is likely that usage of this temporarily open content appears in your reports (it is still counted as Controlled content, even

though it has been temporarily opened). If there is no off-campus access, the publisher is not able to attribute the usage, and it will not appear in the reports.

To check which publishers and vendors have made content open, see the following online resources:

- Jisc in the UK maintains a list at: <https://tinyurl.com/y7f5muuj>
- SCEL in the USA maintains list (fed by the consortia-sourced ICOLC list) at: <https://tinyurl.com/y5nloox7>

HANDLE WITH CARE

Explaining why usage appears to have gone down in this period will be important when reporting on the value of your library's electronic resources. Usage is an important factor in making deselection decisions — we would not like to see publishers penalized for responding so positively to the global pandemic. So please bear these factors in mind when reviewing your COUNTER reports for the period of the pandemic.

SUMMARY

REPORTS AND STANDARD VIEWS

Release 5 provides four Master Reports.

- Title Master Report (book and journal usage)
- Database Master Report
- Platform Master Report
- Item Master Report (repositories and multimedia content)

Additionally, each Master Report has different Standard Views that provide the most useful subset of data to give you quick and convenient access to the information you need most.

METRICS

The Master Reports and their Standard Views show new metrics at Release 5.

- **Investigations** count all types of user action, including clicking on related information and downloading full content.
- **Requests** count only actions that download full-content.
- **Total** metrics count all user actions of the relevant type by a user in a session.
- **Unique** metrics count only the first action for a specific item of content in a session. If the user downloads the same full content twice (even if it is in different formats), the second is not counted.
- **Title** metrics enable you to count usage of books, regardless of how many chapters there are in each book or how the files are downloaded. Use **Unique_Title_Requests** to compare book usage on different platforms in a consistent way.

JOURNALS

The Standard View Journal Requests (Excluding OA_Gold) is designed to assist cost-per-use analysis for paid journal content. It enables you to calculate this immediately, because unpaid usage (OA_Gold) is not counted. This Standard View does not count PDF and HTML use separately, which makes it possible to count downloads more consistently.

The Standard View Journal Requests by Access Type shows all Investigation and Request metrics, so you can easily compare OA_Gold usage with usage of controlled content.

The Standard View Journal Requests by YOP (Excluding OA_Gold) breaks down the usage of journal content by Year of Publication. It only shows Controlled usage. Unlike the Release 4 report JR5, each year has a separate line rather than a column, and usage is shown per month in columns. You can also use this Standard View for cost-per-usage analysis; choose the publication year as a filter.

BOOKS

For book usage, you can measure usage of chapters using the Item metrics and usage of books using the Title metrics. Note that there are some anomalies that make it difficult or impossible to compare usage numbers between Release 4 and Release 5.

Nevertheless, the three Standard Views for books give you useful basis for comparing numbers:

- TR_B1 covers Book Requests (Excluding OA_Gold)
- TR_B2 covers to Access Denials for books
- TR_B3 covers to Book Usage by Access Type

Most importantly, **Unique_Title_Requests** is your best choice for calculating comparable cost-per-usage for books across different platforms.

COMPARISONS AND THE PANDEMIC

When comparing year-on-year following the arrival of the global pandemic, you will almost certainly see some major difference in numbers. There are two main reasons why usage figures will be different:

- Many users have been working from home.
- Some publishers have opened their content for the duration of the outbreak.

Please bear these factors in mind when reviewing your COUNTER reports for the period of the pandemic. We would not like to see publishers penalized for responding positively to the situation.

We hope you have found this helpful.

About the author

Over a long career, **John Hendry** has written about everything from Art and Austrian wine through to Z codes for financial markets.

He has made a speciality of presenting complex matter, including PhD theses, in clear and simple terms that make them accessible to a broader audience. Many of his technical manuals have received awards from user groups and independent surveys.



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